Mage World

"Affiliate Pro" User Manual

Version: 1.1
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Affiliate Marketing Overview

Affiliate marketing is a marketing practice in which a business rewards one or more affiliates for each visitor or customer brought about by the affiliate's own marketing efforts. Marketing your site via customer channel is one of the most effective and least expensive ways to achieve higher targeted traffic, and increase sales.

Affiliate Pro Introduction

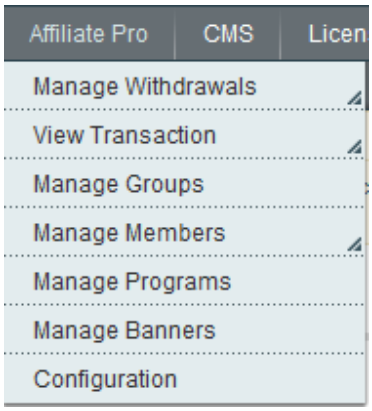
Affiliate Pro is a good solution for you to create your own affiliate program, which is an essential marketing tool for every online business. This module also offers a flexible invitation program and banner creating supported.

Your clients will be provided links and banners to share with their friends via mail or place on their own site, blog... or any social networking such as Facebook, Twitter...

If referee purchase products, referral can get commission and referee might get discount. The commission will be added to client's current balance and they can withdraw or use to checkout. By this way, your customer can contribute to make your marketing strategy become more efficient.

Back-end Overview

In back-end, Affiliate Pro includes seven tabs, which help admin manage affiliate programs, affiliate members as well as member's information and activities.



Manage withdrawals: having two sub-tabs (all withdrawals, pending withdrawals) aim to provide a general look for admin all withdrawal requests of clients (both manual and auto) and their status.

View Transaction: manage credit history (credit change - by order) and affiliate history (commission and discount - by customer).

Manage Groups: Create groups to classify customers.

Manage Program: add and modify Affiliate programs.

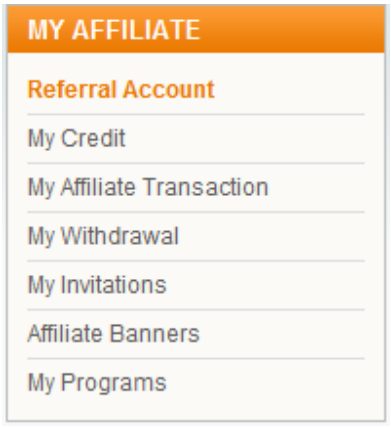
Manage Banners: add and modify Affiliate Banners.

Manage Members: manage all affiliate members (both active and pending). Admin can accept registration request of new members here by changing status.

Configuration: admin can set general configuration for Affiliate module here.

Front-end Overview

At front-end, every Affiliate member has own area to manage their affiliate called My Affiliate. Client can invite friend at the tab My Invitation or using Affiliate Banners. They can view and join programs at My Program, change information at Referral Account and mange credit, affiliate transaction at two left tabs.



Common Rules

- Client's commission will be decided by programs.

- Admin creates groups at Manage Group with the purpose of classifying customers to different groups for managing customer's commission/discount according to group that they belong to.
- One group has its own programs and members. An Affiliate member belongs to only one group, which means it can not be in other groups but a program can belong to multiple groups.
- Every member has their own link, referral code and banner to share.
- Affiliate member must join any available programs for getting commission.
- Affiliate module offers per-product commission and discount tracking.
- Tracking commission by per sale not by per click (only count for completed purchase).
- If customer A is Affiliate member, customer B is invited by customer A (clicked on referral link), we consider some cases:
    - Customer B (not register) buys an order on referral link (this order contains products that belong to customer A's joined program) => customer A receives commission and customer B receives discount (if any).
    - Any times customer B (registered) buys orders (these order contain products that belong to program, which customer A joined) => customer A receives commission and customer B receives discount (if any).
    - Customer B takes part in Affiliate (became Affiliate member), joined same programs with customer A => commission will be counted for customer A.
    - Customer A buys products that belong to his joined programs >> he will get both commission and discount (if any).
    - Customer A and B were joined same programs, customer A's referral account was locked => customer B will get both commission and discount (if any) if buying products of those program.

Installation

1. Copy app/, js/ and skin/ folders to your Magento location. There is no file should be replaced.
2. Go to **Admin – Affiliate Pro** to manage member, department and ticket.
3. Go to **Admin – Configuration – Mage World – Affiliate Pro** to change the configuration.
4. Remember to refresh cache.

Note that: If you meet the problem of "Access Denied", please logout and login again. Any questions, free ask us by post a ticket at http://www.mage-world.com/contacts

General Setting

To guarantee that the Affiliate module work properly, you should follow some steps below:

1. Enable this module at **Setting/Configuration/Mage World/Affiliate Pro** or simply click on the tab **Configuration** in the menu **Affiliate Pro** at backend.
2. Do some general setting at configuration (Please view detail at **User Guide/Admin/Configuration**).
3. Create Affiliate programs (please view detail at **User Guide/Admin/How to create and manage program**).
4. Activate affiliate members' accounts (please view detail at **User Guide/Admin/Manage Affiliate Members**).
5. Setting programs for groups and select group for members.

User guide

Admin

Configuration

General

Enable: Choose Yes to enable Affiliate Pro extension.

Affiliate cookie time: valid time that referee's computer information is stored in database from the time that referee click on referral link (by days, default is 30 days).

Program executing priority: for the products that belong to more than one program, applied program will be determined by program priority, by maximum commission or by maximum discount.

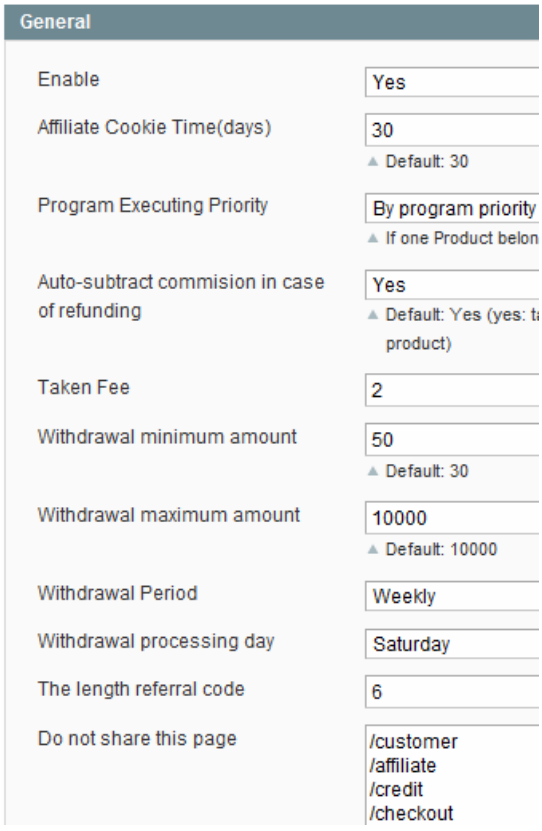
Auto-subtract commission in case of refunding: Choose Yes to take commission back automatically when referee refunds.

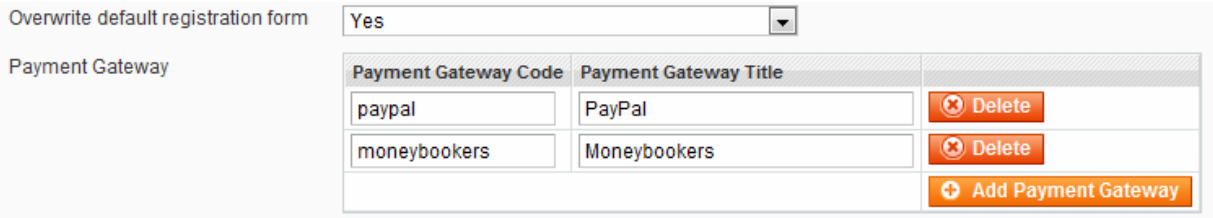
Taken fee: the fee that customer has to pay for each time he withdraws (set by admin, can insert 0 if no fee required)

Withdrawal Period & Withdrawal processing day: use for auto-withdraw, at the chosen day, money will be transfer to referral account.

The referral code's length: insert the length of referral code as you wish.

Do not share this page: choose the page that you don't want to auto-generate Affiliate Link.

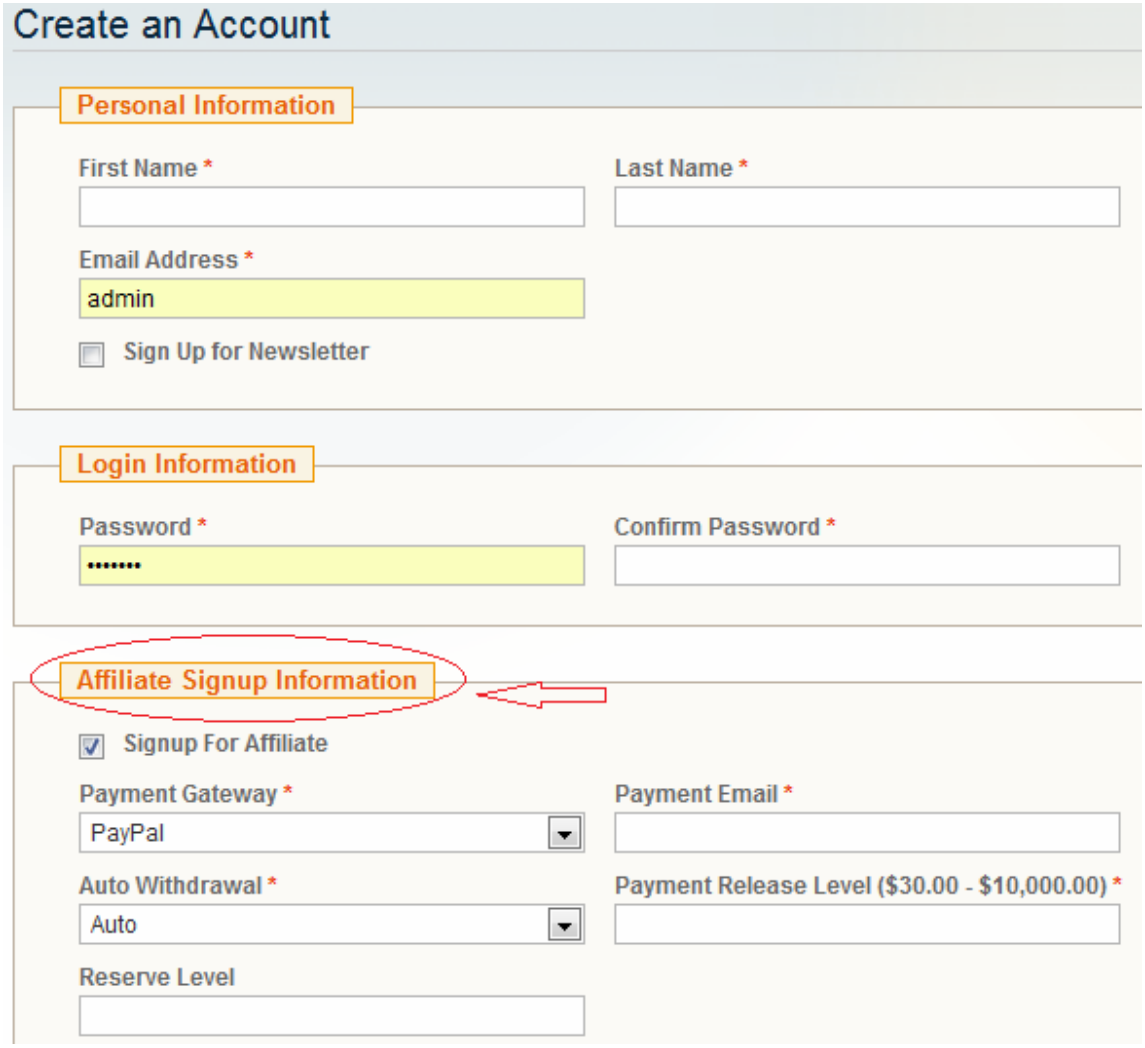




Overwrite default registration form: If yes, the affiliate registration form will be added to customer registration area.

Payment Gateway: admin can add delete payment gateway at configuration.

Affiliate sign up information will be shown at front-end like the image below.

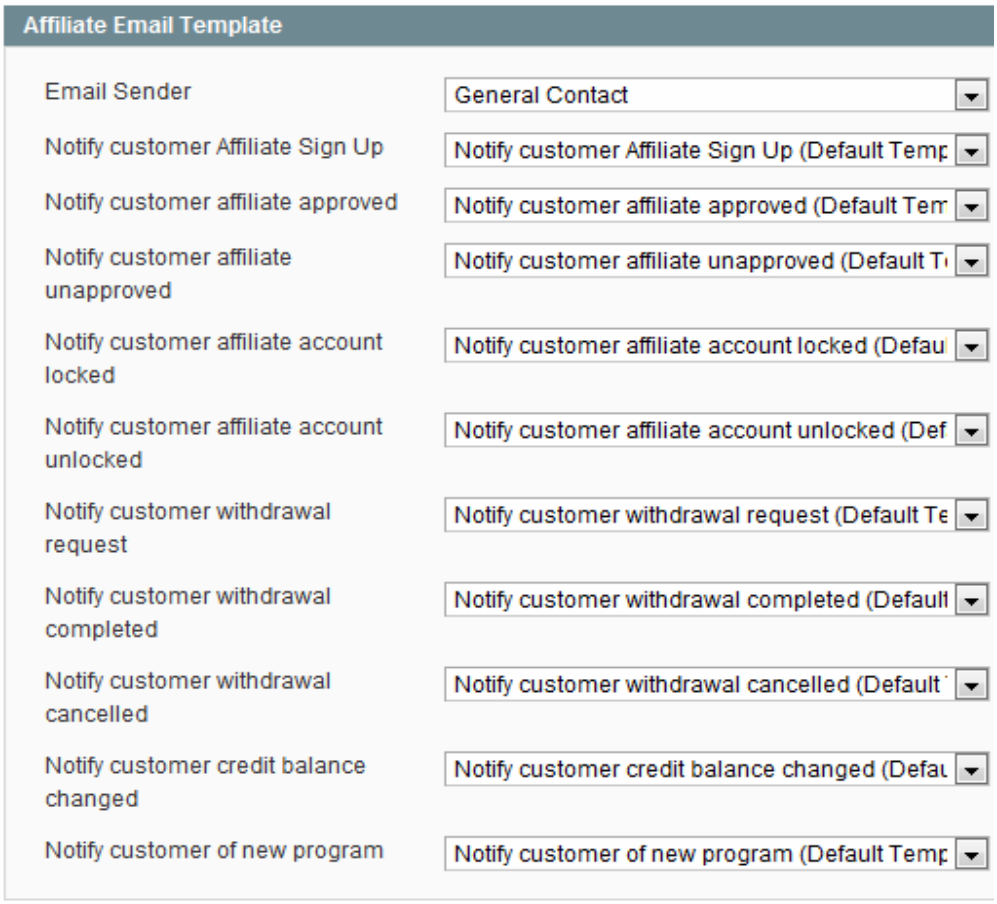


Affiliate Invitation

Send invitation using customer email: Choose Yes to use referral's email.
Email Sender: if not choose YES at the field above, it will take this address to send mail.
Email template for recipients: Choose mail template for referee. Sample template is available.

Affiliate Email Template

These fields allow admin to choose email sender and mail template for referral. Sample templates are available (choose default ones).


Affiliate Email Template
Email Sender
General Contact
Notify customer Affiliate Sign Up
Notify customer Affiliate Sign Up (Default Temp
Notify customer affiliate approved
Notify customer affiliate approved (Default Tem
Notify customer affiliate unapproved
Notify customer affiliate unapproved (Default T
Notify customer affiliate account locked
Notify customer affiliate account locked (Defau
Notify customer affiliate account unlocked
Notify customer affiliate account unlocked (Def
Notify customer withdrawal request
Notify customer withdrawal request (Default Te
Notify customer withdrawal completed
Notify customer withdrawal completed (Default
Notify customer withdrawal cancelled
Notify customer withdrawal cancelled (Default
Notify customer credit balance changed
Notify customer credit balance changed (Defau
Notify customer of new program
Notify customer of new program (Default Temp

Affiliate system will notify Affiliate member of balance change, new program, referral account's status and more.

You can view and edit sample templates by go to **app\locale\en_US\template\email\mw_affiliate**

Admin Notification template

Email sender: choose default email sender when send mail to admin.

Notify admin affiliate sign up: email template for notification.

Send Affiliate request to: insert email address of admin or staff which Affiliate request of new member will be send to (can insert more than one, comma separated).

Credit

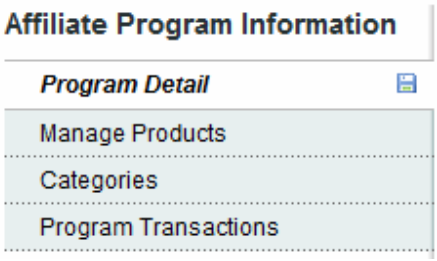
Allow using credit to checkout: Choose Yes if allow client to use credit to checkout.
Max amount of credit to checkout: Limit amount of credit usage. Client can not use over this amount to checkout.

Options
Allow using credit to checkout
Yes
Max amount of credit to checkout
250
Customer can use credit to checkout but not over this amount. Input 0 or leave empty if no limitation

How to create and manage Affiliate program?

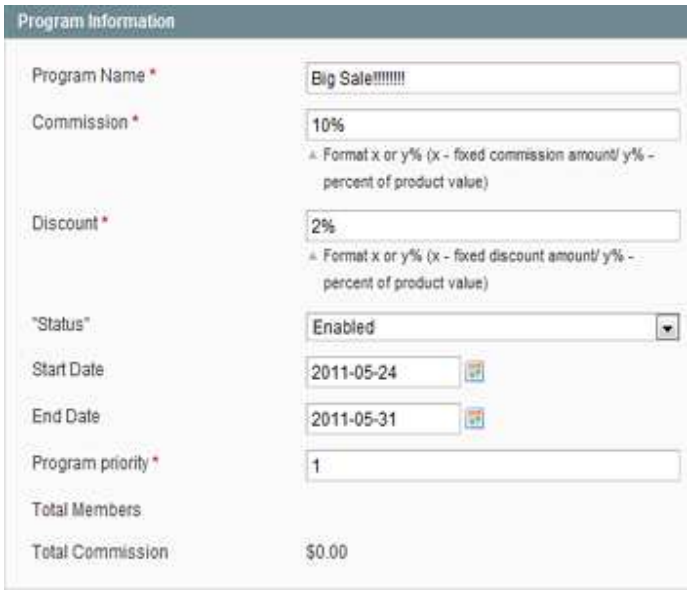
Affiliate Pro module helps you create your own Affiliate program easily.
Add new program by going to **Admin/Affiliate Pro/Manage Program**, choose the button **Add program** at top right of page.

You will see that every program has 4 sub-tabs, which contain every things of a program: properties, program's products and program transactions.



1. Setting rules for program

Program name: insert name of program
Commission: insert commission amount (fixed amount or percent of product value)
Discount: insert discount amount (fixed amount or percent of product value).
Status: program can be in status of enable or disable. If disable, program will be no longer applied.
Start Date/ End Date: Choose start date and end date for program. The program will be automatically expired when end date comes.
Program priority: priority of program
Total members: total affiliate members who joined program.
Total commission: total commission of program's all members.

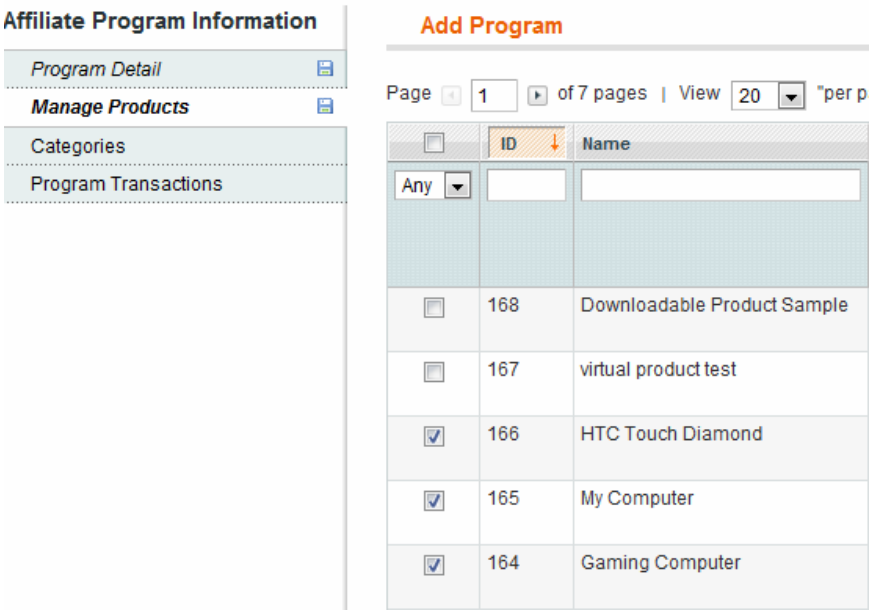


2. Select products for program

You can choose program's product by items or category.

By items: go to the tab **Manage Products** and tick on products, then save program.

By category: go to the tab **Categories**, tick on the categories you want, then save program.



3. Program transaction

Program transaction shows us a list of products that were applied. This list includes information of transaction time, product name, referral name (who receive commission), order number, product value, product commission and discount and status as well.

Transaction Time	Product Name	Customer Email	Order Number	Total Amount By Product	Commission	Discount	"Status"
From: To:				From: To: In: USD	From: To: In: USD	From: To: In: USD	
May 21, 2011 4:44:20 AM	Couch	tieuacma@gmail.com	300000008	$599.99	$60.00	$3.00	Pending
May 20, 2011 10:26:17 AM	Ottoman	phamthuyhanu@gmail.com	300000006	$299.99	$30.00	$3.00	Complete
May 20, 2011 10:10:03 AM	Ottoman	phamthuyhanu@gmail.com	300000005	$299.99	$30.00	$3.00	Complete

How to create banners?

Your customer can place your affiliate banner on their website, blog or any social networking.

To create new banner and edit banner, you can go to **Admin/Affiliate Pro/Manage Banners**

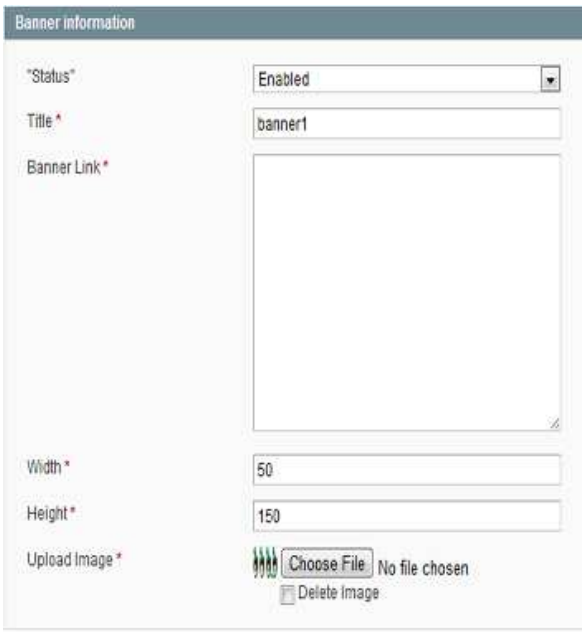
Status: If enabled, this banner will be displayed at front-end.

Title: insert banner title here

Banner link: assign a link to the banner (if click on the banner, it will direct to this link)

Width/height: size of banner

Upload image: upload image from your PC.



Manage Affiliate members

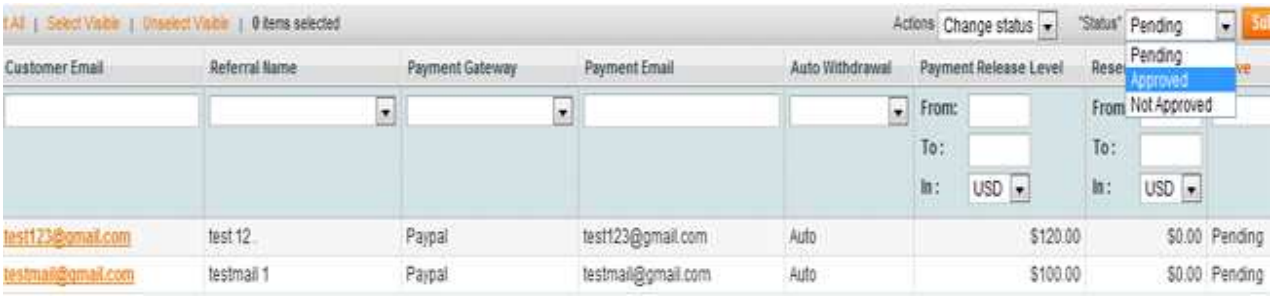
To manage all Affiliate members and approve new ones, you can go to **Admin/Affiliate Pro/ Manage members** >> it has two sub-tabs: **Pending Members** (list all members had sent Affiliate registration request and been waiting for the improvement) and **Active Members** (list of recent Affiliate member, locked ones included).

Pending member

To change pending member to active ones:

1. Go to **Admin/Affiliate Pro/ Manage members/Pending members**
2. Tick on any members you want.
3. See **Action** at top-right**,** choose **Change status,** and at **Status,** choose **approved.**
4. Click on the **Submit** button.

Note: If you does not approve any ones, choose **not approved** at the step 3



Active member

Active member page lists all activated Affiliate members with all information of their balance, total commission, and total paid… You can view detail by move mouse to **View** and click on it.

To lock referral account of any member, tick on this member and change status to **Locked** (once an Affiliate account is locked, this member can't use any Affiliate functions till it is activated again).

View an active member

Affiliate member information page has 6 tabs:

General information: all information of member's Affiliate account.

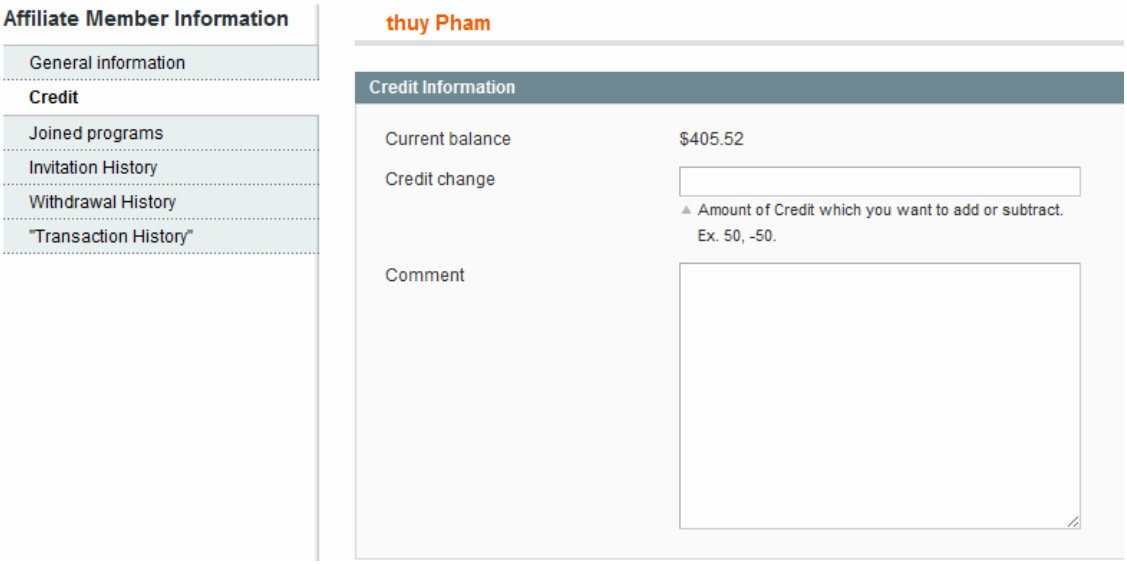
Credit: shows current balance and admin can change customer's balance here (add and subtract by hand, insert reason to the field **Comment** if needed).

Joined program: shows all programs that this member joined.

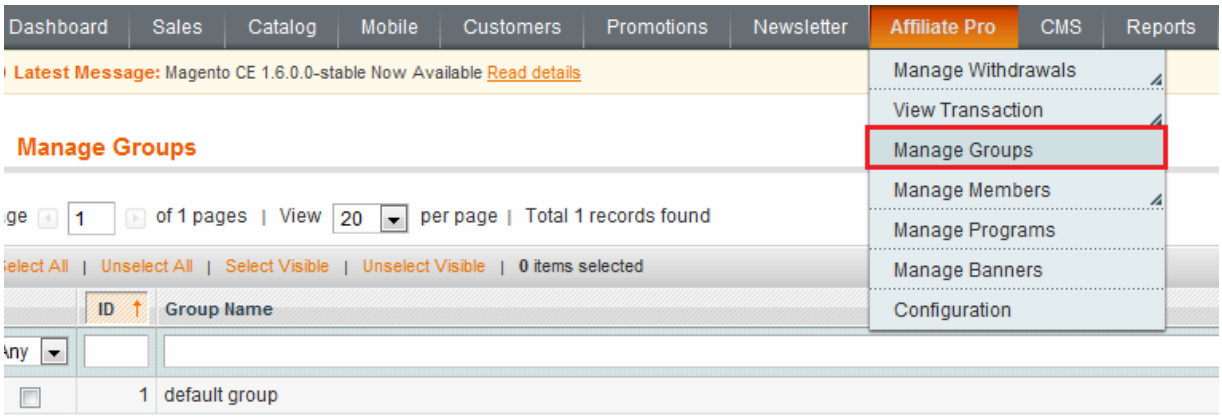
Invitation history: show all invitation that this member sent and their status.

Withdrawal history: shows all withdrawal requests that this member sent and their status.

Transaction history: show all transaction change (by orders).



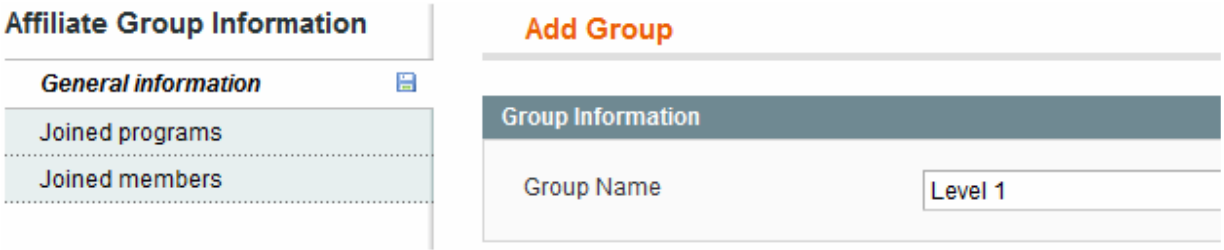
Manage Groups



The tab **Manage Groups** is where that you can create different groups to classify your affiliates. The group with ID **1** is the default group (available when you install the module), which you can modify but not delete. In addition, all active members will automatically fall in this group until you transfer them to the others group. Remember that a member will belong to only one group.

Add new group

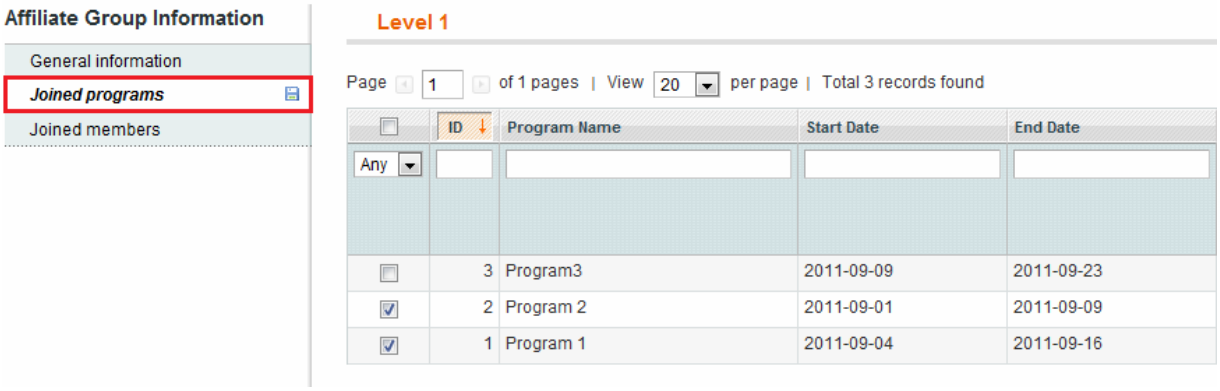
Go to **Affiliate Pro**/**Manage Group**, click on **Add group**



A group has three tabs: typing name of group in the **General Information** tab, the **Joined programs** is the tab to manage group's program and the **Joined members tab** manages group's members.

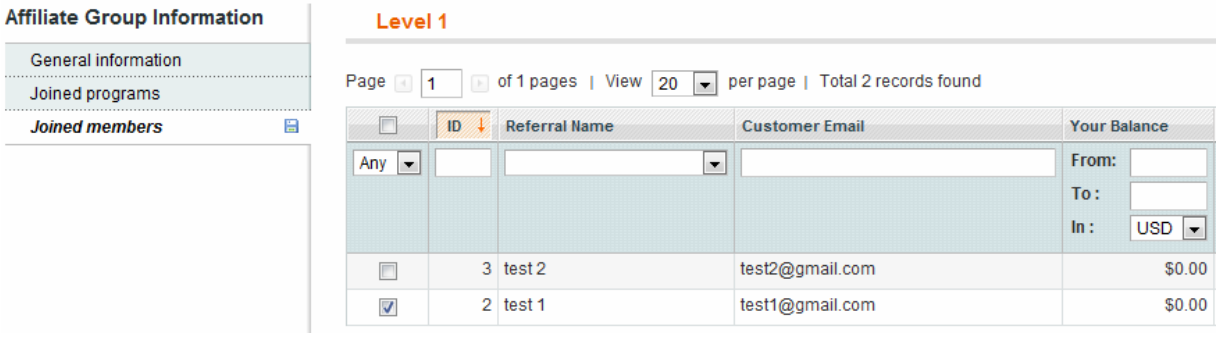
Add program for one group

You have to create program first and all of them will be listed at **Joined Programs** area. Tick on the ones you wish, and then save. All members belong to this group will get commission and discount by the selected programs.



Add member for group

Only approved affiliate members are listed in the **Joined member** tab.

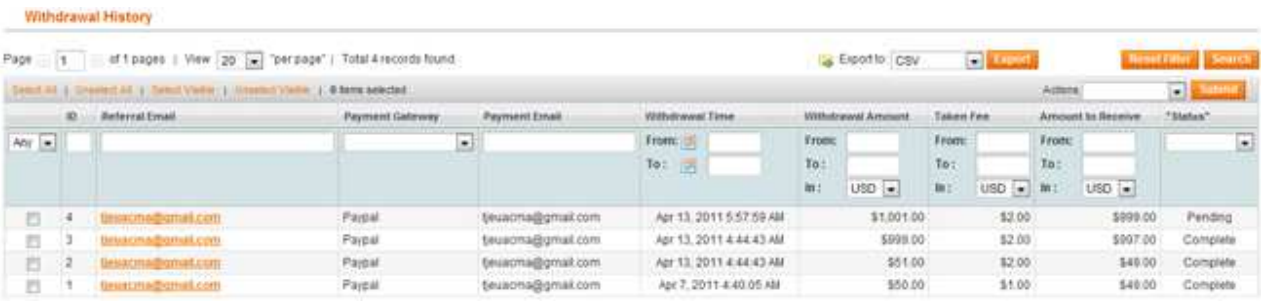


Manage withdrawals

View all withdrawal requests at **Admin/Affiliate Pro/Manage Withdrawal.**

You can change status of any withdrawal request at **Action** on top-right by hand.

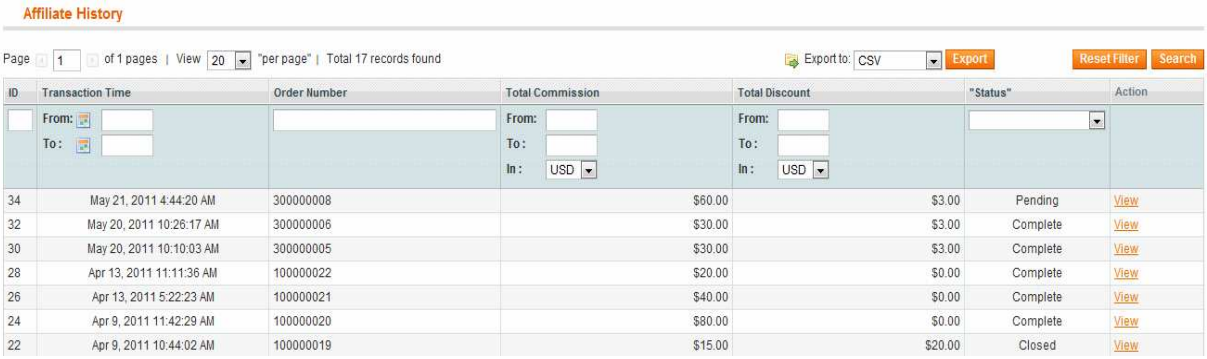
You can export to CSV or XML file if you want.



Manage Transaction

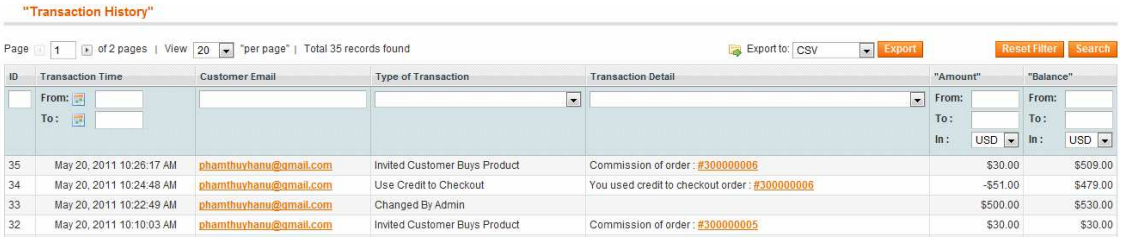
Affiliate history

Provide a general look of all Affiliate commission and discount statistic listed by orders. Click on **View** to see detail.


Affiliate History
Page 1 of 1 pages | View 20 "per page" | Total 17 records found
Export to: CSV Export
Reset Filter Search
ID
Transaction Time
Order Number
Total Commission
Total Discount
"Status"
Action
From: To: In : USD
34 May 21, 2011 4:44:20 AM 300000008 $60.00 $3.00 Pending View
32 May 20, 2011 10:26:17 AM 300000006 $30.00 $3.00 Complete View
30 May 20, 2011 10:10:03 AM 300000005 $30.00 $3.00 Complete View
28 Apr 13, 2011 11:11:36 AM 100000022 $20.00 $0.00 Complete View
26 Apr 13, 2011 5:22:23 AM 100000021 $40.00 $0.00 Complete View
24 Apr 9, 2011 11:42:29 AM 100000020 $80.00 $0.00 Complete View
22 Apr 9, 2011 10:44:02 AM 100000019 $15.00 $20.00 Closed View

Credit History

All changes of credit balance is listed (time, specific member, type, amount included).


"Transaction History"
Page 1 of 2 pages | View 20 "per page" | Total 35 records found
Export to: CSV Export
Reset Filter Search
ID
Transaction Time
Customer Email
Type of Transaction
Transaction Detail
"Amount"
"Balance"
35 May 20, 2011 10:26:17 AM phamthuyhanu@gmail.com Invited Customer Buys Product Commission of order : #300000006 $30.00 $509.00
34 May 20, 2011 10:24:48 AM phamthuyhanu@gmail.com Use Credit to Checkout You used credit to checkout order : #300000006 -$51.00 $479.00
33 May 20, 2011 10:22:49 AM phamthuyhanu@gmail.com Changed By Admin $500.00 $530.00
32 May 20, 2011 10:10:03 AM phamthuyhanu@gmail.com Invited Customer Buys Product Commission of order : #300000005 $30.00 $30.00

Affiliate registration link

This module provides a registration link for admin and he can place this link anywhere on site.

Please add the following direction after your site address

affiliate/accountnew/createaffiliate

For example:

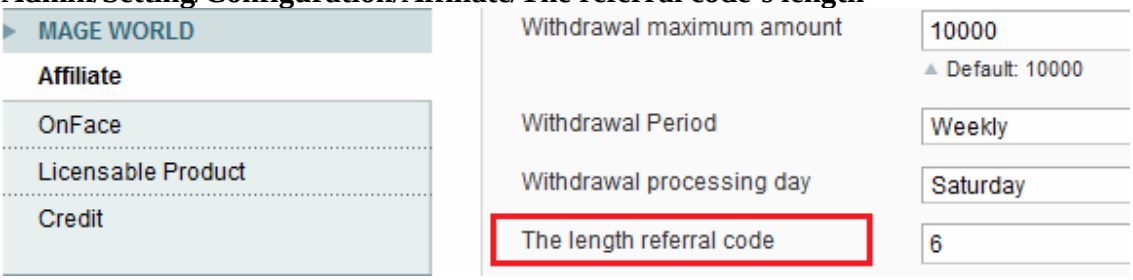
http://www.mage-world.com/index.php/affiliate/accountnew/createaffiliate.

If non-Affiliate member click on this link, he will be directed to the registration page. Otherwise (in case of Affiliate member), he will see My Affiliate page.

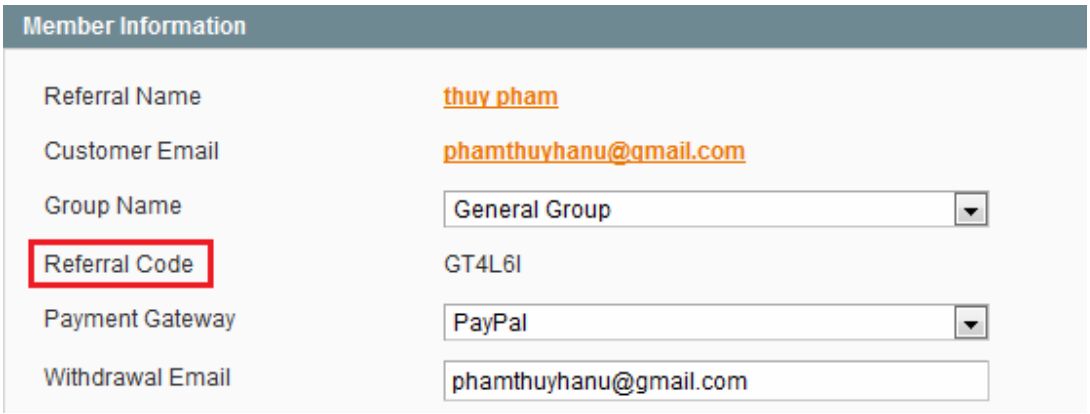
Referral code

Every affiliate has his unique referral code. If referee type a code (optional) when registering, the system will update his referral according by referral code. Customer can type referral code to get discount when checkout order.

The administrator can decide the length of referral code in
Admin/Setting/Configuration/Affiliate/The referral code's length



Referral code will be update in Customer General Information
Go to Admin/Affiliate/ManageMembers/ActiveMembers/(choose one and see)



Client

Subscribe to the Affiliate system

Guest can sign up Affiliate while register into the site at **Create an account** page.

Registered customer can subscribe to Affiliate at **My Account/ My Affiliate.**

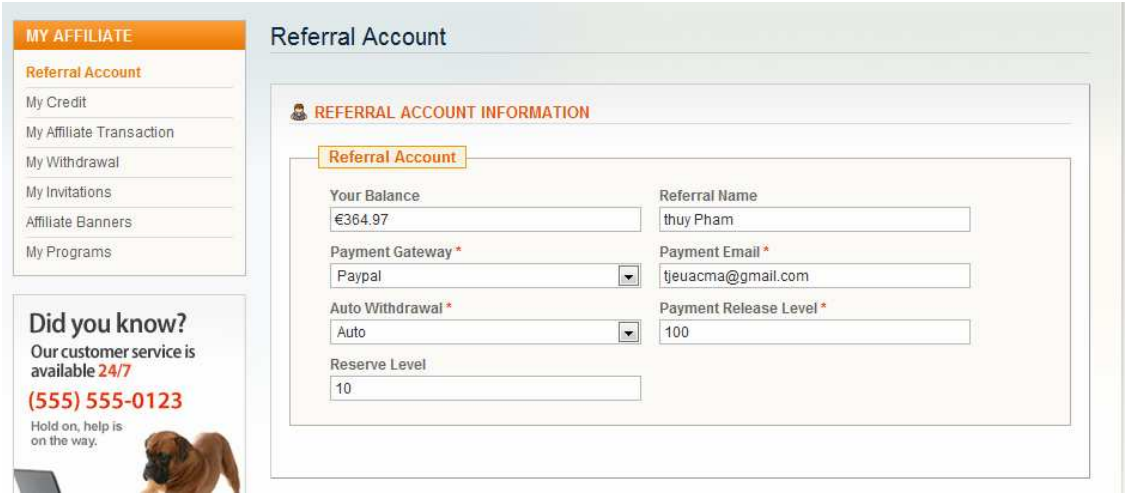
After registering, it will direct him to **my account/ my affiliate** and he will see a notification of waiting the administrator approval. Once his affiliate request is approved, he can use all features of Affiliate system.

My Affiliate page at front-end has seven tabs: referral account, my credit, my affiliate transaction, my withdrawal, my invitations, affiliate banner and my program. Please follow the next part to view detail of these tabs.

Change referral account

Affiliate member can change his or her referral account at **My Account/My Affiliate/Referral account.**

He or she can choose withdraw automatically or manual. If manual, insert requested amount and submit at **My Account/My Affiliate/My Withdrawal.**



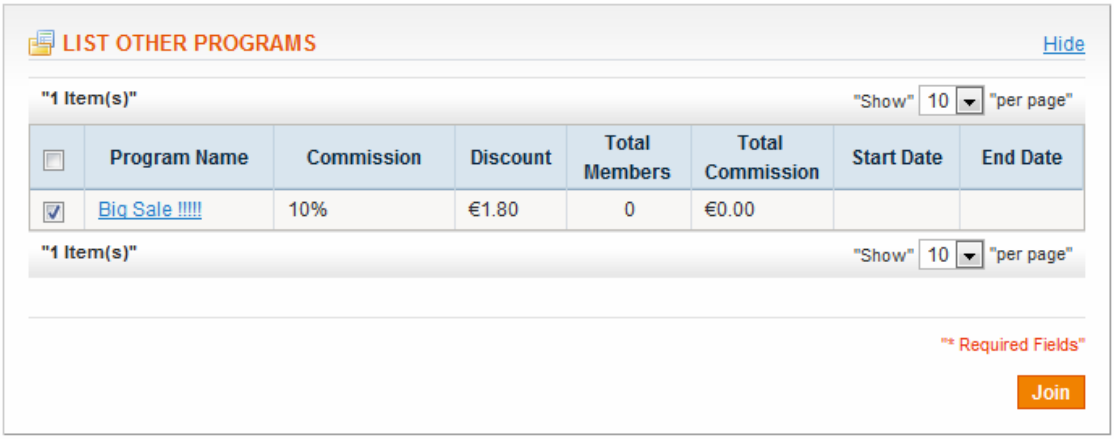
Reserve level is the amount of money that customer wish to leave in his account (he don't want to withdraw all but a fixed amount always exist in his balance). This field is not required, its value due to customer.

How to earn commission with Affiliate

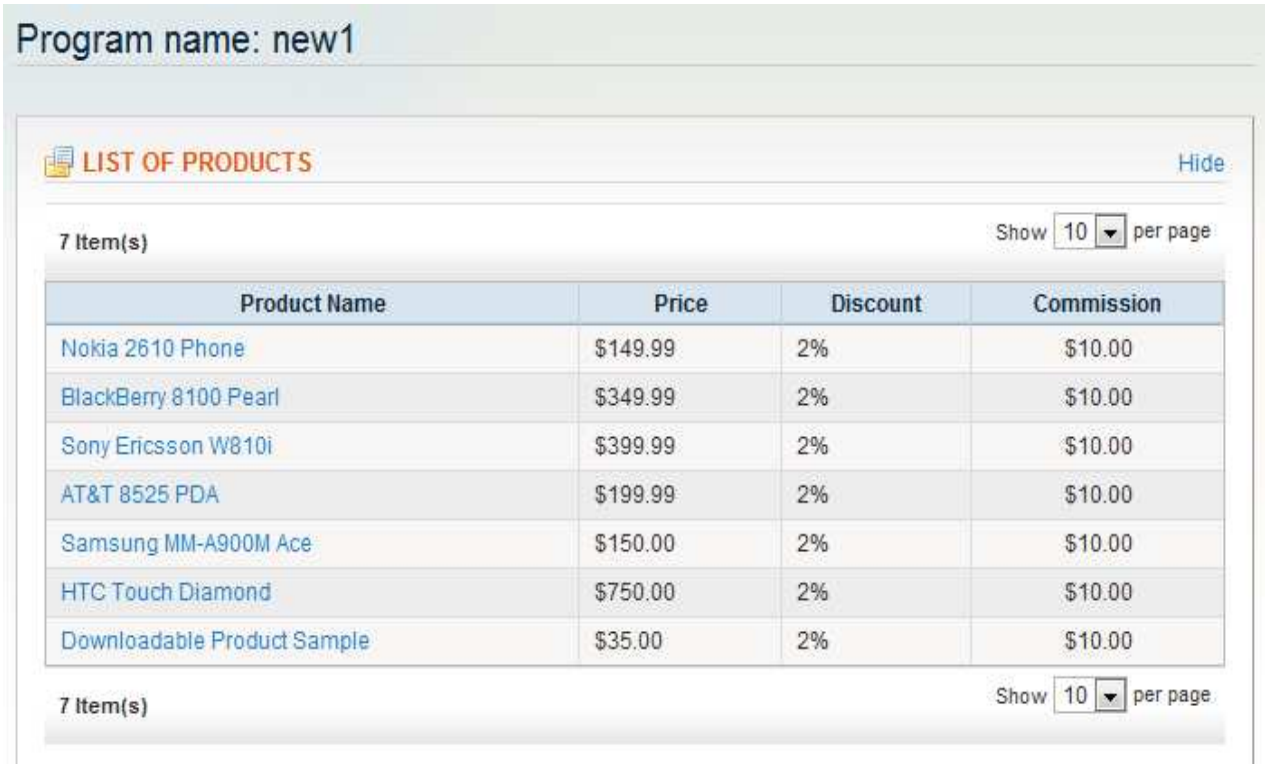
1. Join program

The first thing that Affiliate member should do is to join a program.

Go to **My Account/My Affiliate/My Programs** to select programs to join. You can join one program or all of ones.



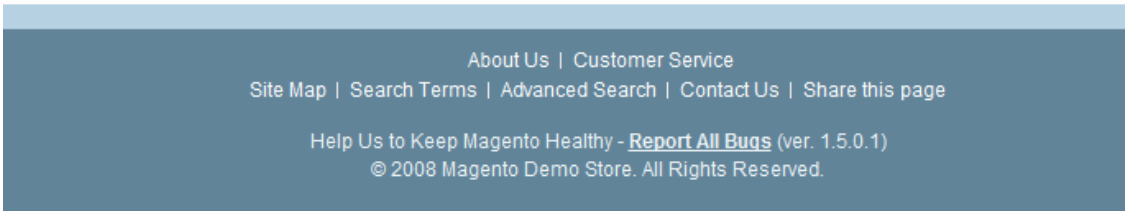
Click on program name to view program detail, all products of the program will be listed. If referee buys these products, referral will get program commission.



2. *Start marketing the site*

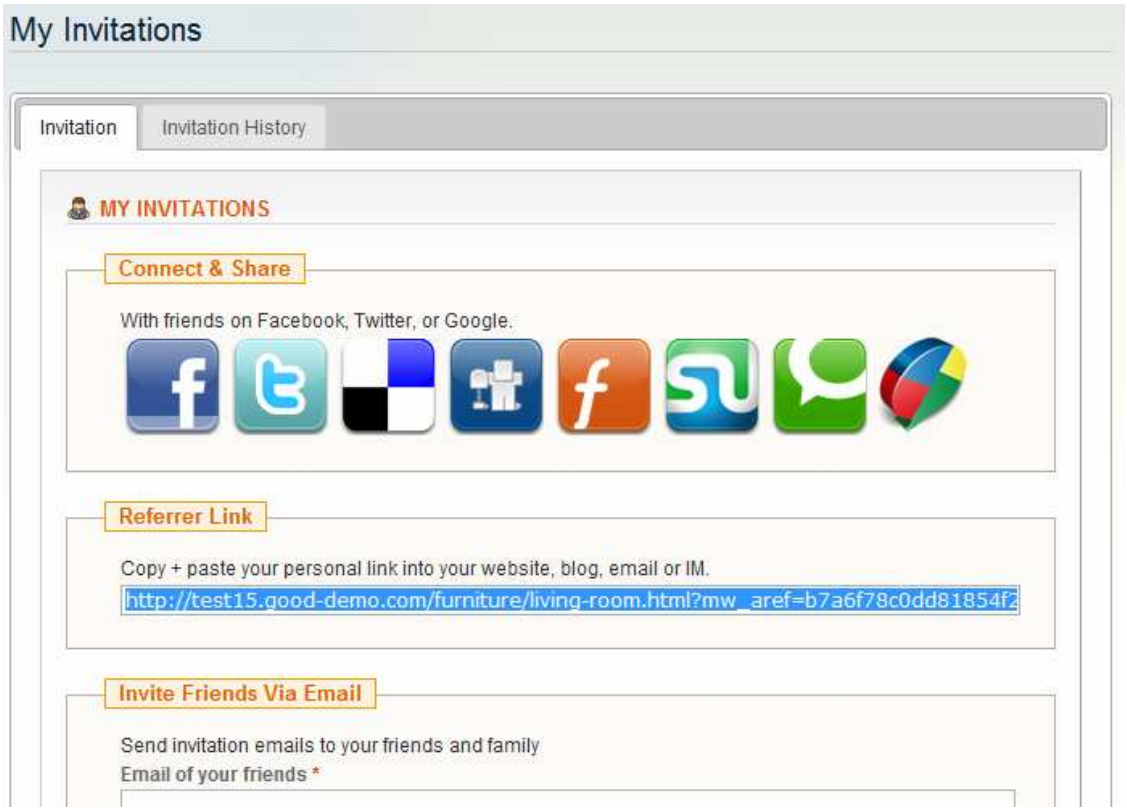
a. *Using invitation link*

With any pages you visit, you will see ***Share this page*** at footer


About Us | Customer Service
Site Map | Search Terms | Advanced Search | Contact Us | Share this page
Help Us to Keep Magento Healthy - Report All Bugs (ver. 1.5.0.1)
© 2008 Magento Demo Store. All Rights Reserved.

Click on **Share this page**; it will direct you to **My Account/ My Affiliate/ My invitation**.

Start sharing the link with your friend, Affiliate system supports you to share on anywhere you want.

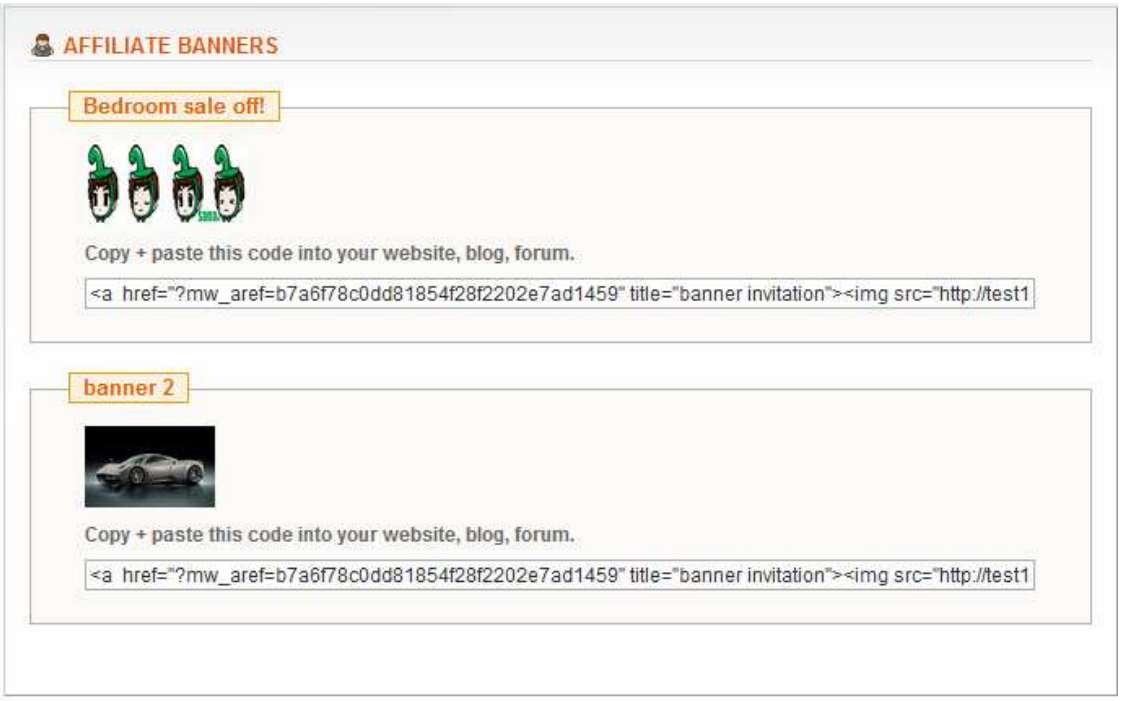

My Invitations
Invitation
Invitation History
MY INVITATIONS
Connect & Share
With friends on Facebook, Twitter, or Google.
Referrer Link
Copy + paste your personal link into your website, blog, email or IM.
http://test15.good-demo.com/furniture/living-room.html?mw_aref=b7a6f78c0dd81854f2
Invite Friends Via Email
Send invitation emails to your friends and family
Email of your friends *

b. Using banner

You can place Affiliate banners on your website, your blog or any social networking.

To take banner, please go to **My Account/ My Affiliate/ Affiliate banners**.

This page will list of banners, you choose a suitable banner, copy the fragment of code and paste to forum, blog, website…



How to use credit?

Affiliate member can withdraw or use credit to checkout.

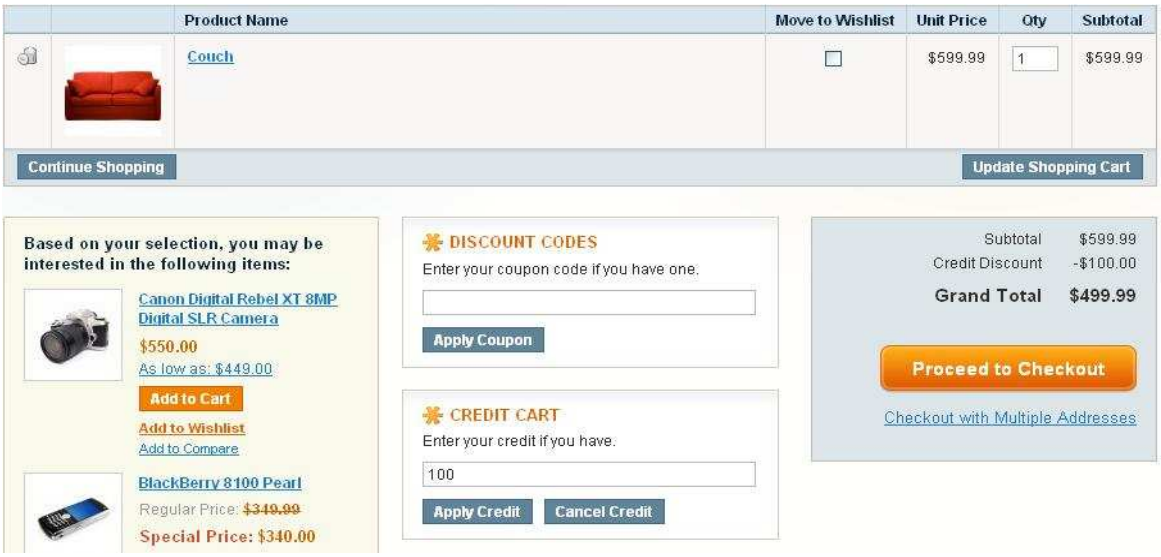
1. Withdraw

Affiliate member can choose withdraw automatically or manual. If manual, please go to **My Account/ My Affiliate/ My withdrawal**

2. Use credit to checkout

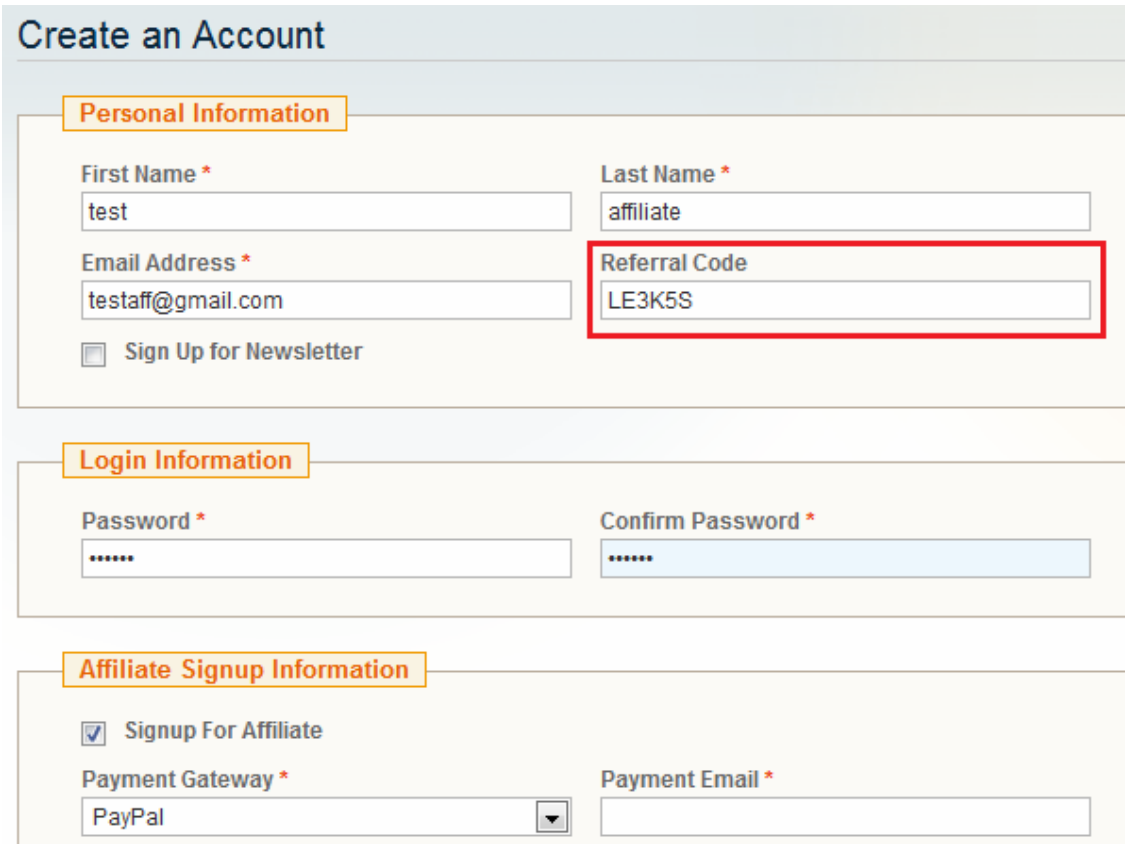
You can use credit to check out after adding product to cart.

Go to **Shopping Cart,** find the **Credit Cart** area, insert amount of credit you want to spend and **Grand Total** will be updated.

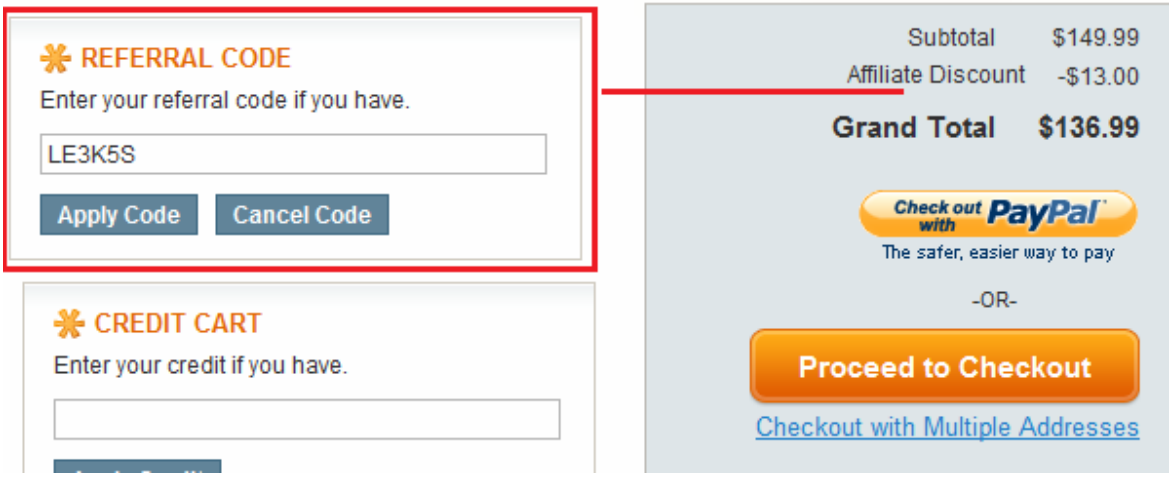


How to use Referral code?

Insert when create new account. The referral will be sent together with invitation mail.



Insert in box of referral code at shopping cart to get discount:



Note: Referral can not use his own referral code to get discount but can insert other's referral code to get it.

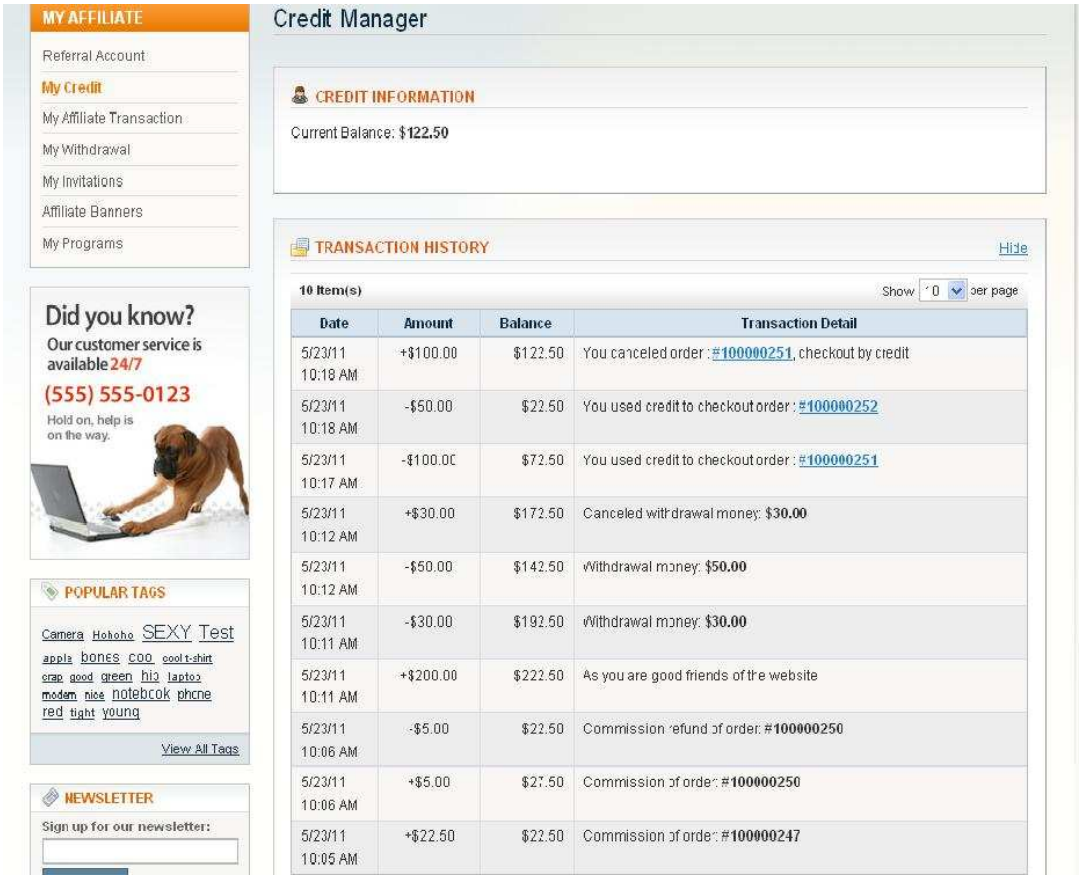
Other tabs at front-end

My Affiliate Transaction

Allow to view a list of placed order of referee and total commission for referral.

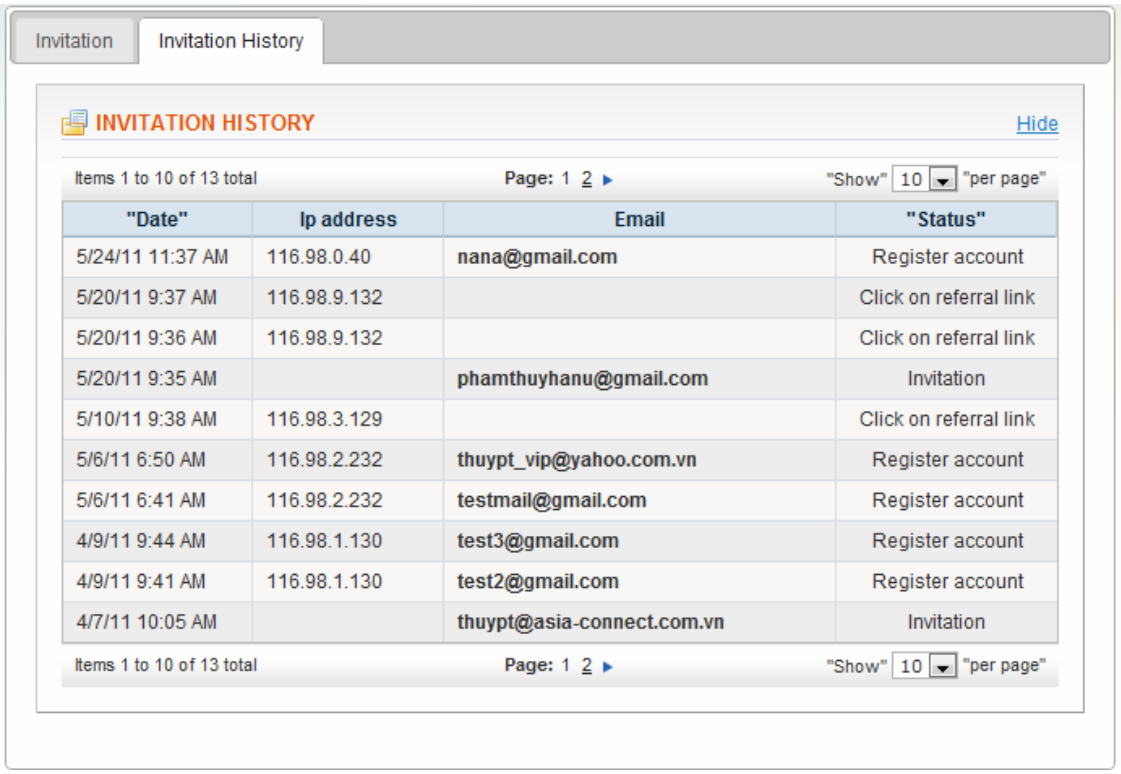
My Credit

Show current balance and transaction detail.


MY AFFILIATE
Referral Account
My Credit
My Affiliate Transaction
My Withdrawal
My Invitations
Affiliate Banners
My Programs
Did you know?
Our customer service is available 24/7
(555) 555-0123
Hold on, help is on the way.
POPULAR TAGS
Camera Hohoho SEXY Test apple bones coo cool t-shirt crap good green hio laptop modern nice notebook phone red tight young
View All Tags
NEWSLETTER
Sign up for our newsletter:
Credit Manager
CREDIT INFORMATION
Current Balance: $122.50
TRANSACTION HISTORY
Hide
10 Item(s)
Show 10 per page
Date | Amount | Balance | Transaction Detail
5/23/11 10:18 AM | +$100.00 | $122.50 | You canceled order : #100000251, checkout by credit
5/23/11 10:18 AM | -$50.00 | $22.50 | You used credit to checkout order : #100000252
5/23/11 10:17 AM | -$100.00 | $72.50 | You used credit to checkout order : #100000251
5/23/11 10:12 AM | +$30.00 | $172.50 | Canceled withdrawal money: $30.00
5/23/11 10:12 AM | -$50.00 | $142.50 | Withdrawal money: $50.00
5/23/11 10:11 AM | -$30.00 | $192.50 | Withdrawal money: $30.00
5/23/11 10:11 AM | +$200.00 | $222.50 | As you are good friends of the website
5/23/11 10:06 AM | -$5.00 | $22.50 | Commission refund of order: #100000250
5/23/11 10:06 AM | +$5.00 | $27.50 | Commission of order: #100000250
5/23/11 10:05 AM | +$22.50 | $22.50 | Commission of order: #100000247

My invitation / Invitation History

Show invitation history of affiliate members with their status.


Invitation
Invitation History
INVITATION HISTORY
Hide
Items 1 to 10 of 13 total
Page: 1 2
"Show" 10 "per page"
"Date"
Ip address
Email
"Status"
5/24/11 11:37 AM 116.98.0.40 nana@gmail.com Register account
5/20/11 9:37 AM 116.98.9.132 Click on referral link
5/20/11 9:36 AM 116.98.9.132 Click on referral link
5/20/11 9:35 AM phamthuyhanu@gmail.com Invitation
5/10/11 9:38 AM 116.98.3.129 Click on referral link
5/6/11 6:50 AM 116.98.2.232 thuypt_vip@yahoo.com.vn Register account
5/6/11 6:41 AM 116.98.2.232 testmail@gmail.com Register account
4/9/11 9:44 AM 116.98.1.130 test3@gmail.com Register account
4/9/11 9:41 AM 116.98.1.130 test2@gmail.com Register account
4/7/11 10:05 AM thuypt@asia-connect.com.vn Invitation
Items 1 to 10 of 13 total
Page: 1 2
"Show" 10 "per page"